

Multifamily Tenant Characteristics System (MTCS)



**Ad Hoc Selection Guide
September 1999**

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1. Summary

Ad Hoc Selection allows you to create your own customized reports through the selection of a subset of Form HUD-50058 fields.

This guide helps users to:

- Comprehend *Ad Hoc Selection* options
 - Access *Ad Hoc Selection* reports
 - Understand MTCS report data fields
- * This guide is for the *Ad Hoc Selection* reports and is not intended to be a sole source for MTCS report users. For information on other reports, please go to:

www.hud.gov/pih/systems/mtcs/document.html

2. Ad Hoc Selection Options

MTCS provides three *Ad Hoc Selection* options. Select the option that meets your needs.

1. Random tenant sample
2. Standard download
3. User-defined Ad Hoc query

2.1 Random Tenant Sample

MTCS provides you with a utility to generate random tenant samples from your PHA. Use the random tenant tool to develop samples for PHA surveys or conduct research. This tool allows you to select three different sample types from your PHA:

- All families
- New admissions
- FSS families

To generate a random sample, you **must** request fewer families than the number of families in the database. **The minimum sample size that you can request is 30.** You can narrow your sample by effective date. The sample provides you with tenants:

- Social Security numbers (SSN)
- Names (Last, First, M.I.)
- Addresses include city, state, and zip code

2.2 Standard Download

The 'standard download' option is available from the *Ad Hoc Program Selection Menu*.

This immediate Ad Hoc download option allows you to retrieve ten pre-selected fields for download and not worry about which fields you need to select. This option is available for all PHAs and replaces the need to call the MTCS Hotline for the "Large HA report."

The ten fields available through the 'standard download:'

1. HA code or project number (line 1g)
2. Program type (line 1d)
3. Type of action (line 2a)
4. Effective date of action (line 2b)
5. Head of household last name (line 3b)
6. Head of household first name (line 3c)
7. Head of household Social Security number (line 3n)
8. Total number in household (line 3r)
9. Total annual income (line 7m)
10. Total tenant payment (line 9j)

2.3 User-Defined Ad Hoc Query

A 'user-defined Ad Hoc query' allows you to create a customized report. You can select from Form HUD-50058 fields to meet your own reporting needs.

Section 5 lists Form HUD-50058 fields and summary fields available for Ad Hoc queries.

3. Access Ad Hoc Reports

From the *MTCS Main Menu*,

- Use your mouse to click on the words '**Ad Hoc Selection**'

Ad Hoc Selection

The *Ad Hoc Program Selection Menu* appears on your screen.

4. Ad Hoc Program Selection Menu

From the *Ad Hoc Program Selection Menu*,

- Use your mouse to select a 'program' type
 - You can use your mouse to select more than one program

4.1 PHA Personnel

For **PHA personnel**,

- Use your mouse to select a 'level of information'
 - Housing Agency
 - Project

If you select '**Housing Agency**,' a field with your PHA code appears.

If you select '**Project**,' MTCS prompts you to select a project from the drop-down box.

- Use your mouse to select a project

Once you select an option,

- Use your mouse to click on the '**Next**' button

The *Ad Hoc Program Selection Menu* appears on your screen, and you have three options.

You can request a:

- Random tenant sample
- Standard download
- User-defined query with customized field selection

4.2 HUD Personnel

For **HUD personnel**,

- Use your mouse to select a 'level of information'
 - Field Office
 - Housing Agency
 - Project

If you select '**Field Office**,' you are prompted to select a field office from the drop-down box.

- Use your mouse to select a field office

If you select '**Housing Agency**,' you are prompted to select a PHA from the drop-down box.

- Use your mouse to select a PHA

If you select '**Project**,' you are prompted to select a project from the drop-down box.

- Use your mouse to select a project

Once you select an option,

- Use your mouse to click on the '**Next**' button

The *Ad Hoc Program Selection Menu* appears on your screen, and you have three options.

You can request a:

- Random tenant sample
- Standard download
- User-defined query with customized field selection

4.3 Access Random Tenant Sample

The 'random tenant sample' option is only available at the 'Housing Agency' level of information.

To request a 'random tenant sample,'

- Use your mouse to select the '**Random Tenant Sample**' button

The *Ad Hoc Selection Menu-Random Sample Menu* appears.

You have three selections to choose from:

- Include FSS participants
 - Exclude FSS participants
 - FSS participants only
- Use your mouse to select the option that meets your sampling needs
- Type a sample size into the 'sample size' field (this number must be greater than 30)
- Use your mouse to click on the '**Random Request Sample**' button
- A confirmation message appears on your screen that indicates your request will process by the next business day

The next day, when you access the *MTCS Main Menu*, the words '**Random Sample**' appear on your screen.

- Use your mouse to click on the words '**Random Sample**'
 - This random sample will only be available from the *Main Menu* for two weeks from your request date or until you generate another random sample.

A prompt appears that provides two options:

- Open it
 - Save it to disk
- Use your mouse to select the desired option

If you select 'Open it,' an application (such as Microsoft Excel) immediately displays your data.

If you select 'Save it to disk,' you should:

- Locate the directory where you would like to save the file
- Use your mouse to click '**Save**'
- Unzip your file with your zip/unzip application, such as 'Winzip'
- The zip/unzip application creates a new file with the converted information in a *.txt format
- Open the application where you wish to import the file.
- Follow the steps in the Help function or software documentation for instructions to import comma-separated or delimited files into your selected application.

- * Ad Hoc fields should appear in the downloaded data file in the same order they appear in the field selection (regardless of the order that you select the fields). The column names appear as the first row in the data file.

4.4 Access Standard Download

To request a 'standard download,'

- Use your mouse to select the '**Standard Download**' button

A prompt appears that provides two options:

- Open it
- Save it to disk

- Use your mouse to select the desired option

If you select 'Open it,' an application (such as Microsoft Excel) immediately displays your data.

If you select 'Save it to disk,' you should:

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- * Ad Hoc fields should appear in the downloaded data file in the same order they appear in the field selection (regardless of the order that you select the fields). The column names appear as the first row in the data file.

4.5 Access User-Defined Ad Hoc Query

To request a 'user-defined Ad Hoc query':

- Use your mouse to select a 'Type of Action'
 - To select or than one 'type of action,' use your mouse and hold down the [Shift] key simultaneously
- Select an 'Effective Date of Action'
 - To limit your time parameter, enter the date with a four-digit year (MM/DD/YYYY) in the Effective Date of Action fields. If you do not enter dates, you receive all 18 months of family data in the database that match your selection criteria.
- Use your mouse to select a 'Sorting Requirement'
 - The default is 'By Head of Household's Last Name'
- Use your mouse to click the button '**Go to Field Selection**'

The *Ad Hoc Field Selection Menu* appears on your screen.

From the *Ad Hoc Field Selection Menu*,

- Use your mouse to select a data output option,
 1. **Download now:** provides a zip file limited to ten user selected fields; excludes summary fields
 2. **Next day download:** provides a zip file of any number of fields, includes summary fields
 3. **Display data on screen:** provides an on screen report of selected fields immediately regardless of the number of fields selected
- Use your mouse to select the data fields you want to include in your query
- After you have made your field selections, use your mouse to scroll to the bottom of the page
- Use your mouse to click on the '**Run Query**' button and Ad Hoc generates your report
If you select 'download now' or 'next day download,' a prompt appears that provides two options:
 - Open it
 - Save it to disk

- Use your mouse to select the desired option

If you select 'Open it,' an application (such as Microsoft Excel) immediately displays your data.

If you select 'Save it to disk,' you should:

- Locate the directory where you would like to save the file
 - Use your mouse to click '**Save**'
 - Unzip your file with your zip/unzip application, such as 'Winzip'
 - The zip/unzip application creates a new file with the converted information in a *.txt format
 - Open the application where you wish to import the file.
 - Follow the steps in the Help function or software documentation for instructions to import comma-separated or delimited files into your selected application.
- * Ad Hoc fields should appear in the downloaded data file in the same order they appear in the field selection (regardless of the order that you select the fields). The column names appear as the first row in the data file.

5. Ad Hoc Fields

Only designated fields are available for Ad Hoc queries.

- Fields available for pre-selected, 'Standard Download' are *italicized*
- Fields only available for "Next Day Download" are marked by an **asterick (*)**

50058 Field	Description
1b	HA State
1c	<i>HA Number</i>
1d	<i>Program</i>
1e	Project State, if different from 1b
1f	Project/Originating HA Number if different than 1c
1g	<i>Project Number</i>
1h	Suffix Number
2a	Type of action
2b	<i>Effective date of action</i>
2c	Date of admission to program
2e	FSS participant now or in the last year?
2f	Use if instructed by HUD
3b	<i>Head of Household Last Name & Sr, Jr, etc.</i>
3c	<i>Head of Household First Name</i>
3d	Head of Household MI
3e	<i>Head of Household Date of Birth</i>
3g	Head of Household Sex
3k	Head of Household Race
3m	Head of Household Ethnicity
3n	<i>Head of Household Social Security Number</i>
3r	<i>Total number in household</i>
3s	Family subsidy status under Noncitizen rule
4b	Zip Code Before Admission
5a	Current Zip Code
5c	Number of bedrooms in unit
5d	Is this one of the units that the HA has identified as an accessible unit?
5e	Has the family requested accessibility features?
5f	Has the family received the requested accessibility features?
5g	Date Unit Last Passed Inspection
5h	Date Unit Last Inspected
7m	<i>Total Annual Income</i>
8i	Medical/disability assistance allowance
8j	Elderly/disability allowance
8k	Number of dependents
8n	Dependent allowance
8p	Yearly child care cost that is not reimbursed

50058 Field	Description
8q	Travel cost to work/school (Indian Housing only)
8r	Optional earned income deduction
8u	Total Allowances
9f	TTP if based on adjusted annual income
9h	Minimum TTP, put 0 if waived
9j	TTP
10b	Ceiling rent, if any
10d	Utility allowance, if any
10e	Tenant rent
10h	Public/Indian Housing maximum rent
10j	Total number eligible
10k	Total number in family
10p	Mixed family TTP
10s	Mixed family tenant rent
11a	Number of bedrooms on Certificate
11b	Is family now moving to this unit
11d	Portability
11e	Cost billed per month
11f	HA Number billed
11g	Housing Type - OFTO
11g	Housing Type - Project based Certificate program unit
11g	Housing Type - Mod Rehab funding used for Certificates
11g	Housing Types - IGR has continual supportive services
11g	Housing Types - SRO : 1 room occupied by 1 person
11h	Owner Name
11i	Owner TIN/SSN
11j	FMR or exception rent
11k	Contract rent to owner
11m	Utility allowance, if any
11n	Gross rent of unit
11q	TTP
11r	Total HAP
11s	Tenant rent
11t	HAP to owner
11ae	Total number eligible
11af	Total number in family
11ah	Prorated total HAP
11ai	Mixed family TTP
11ak	Mixed family tenant rent
12a	Number of bedrooms on Voucher
12b	Is family now moving to this unit
12d	Portability
12e	Cost billed per month
12f	HA Number billed

50058 Field	Description
12g	Housing Types - IGR has continual supportive services
12g	Housing Types - SRO 1 room occupied by 1 person
12h	Owner Name
12i	Owner TIN/SSN
12j	Voucher payment standard
12n	Utility allowance, if any
12q	Gross rent of unit
12w	HAP to owner
12x	Family rent to owner
12y	Utility reimbursement to family
12ac	Total number eligible
12ad	Total number in family
12af	Prorated total HAP
12ag	Mixed family total family contribution
12ai	Mixed family tenant rent
13d	Owner Name
14h	Owner TIN/SSN
15e	Net cost
15f	Administration charge
15h	Family cost
N/A	FSS Addendum Indicator
N/A	MSA
N/A	County
N/A	City
N/A	Congressional District
N/A	Latitude
N/A	Longitude
N/A	Census tract
N/A	State
N/A	Region
N/A	Field Office
N/A	Sender ID
N/A	SUMMARY FIELDS
	*Distribution of Household Members By Age:
---	0 - 3
---	4 - 5
---	6 - 12
---	13 - 17
---	18 - 19
---	20 - 21
---	22 - 49
---	50 - 61
---	62 - 79
---	80+
	*Income Quantity by Source:

50058 Field	Description
---	Any Wages (Federal Wage, HA Wage, Military Pay, Own Business, Other Non wage)
---	Welfare (TANF, General Assistance)
---	SSI (Supplemental Security Income)
---	SS/Pension (Social Security, Pension)
---	Other Income (Child support, Indian Trust, Unemployment Assistance)
---	Asset Income
	*Distribution of Household Members by Disability Status:
---	Number of Elderly with Disabilities
---	Number of Non-Elderly with Disabilities
---	*Family Type
	Age 62 and over
	Under 62 with disabilities
	Other families with dependents
	Other families without dependents
	All families with dependents
5a	*Unit Address
5a	*Unit Apartment Number
5a	*Unit City

6. Report Applications

There are a variety of different uses for Ad Hoc reports. This section highlights some of the important data fields MTCS users can select to generate a report. Ad Hoc reports provide valuable, customized information to MTCS users based on their own data needs.

HUD intends users to challenge information contained in MTCS reports because often, upon further investigation, the problems or issues may be different than they appear in MTCS. Use MTCS data and reports as a starting point for discussion, investigation, research, and analysis.

6.1 Key Data Fields

Frequently used fields to conduct analysis include:

- Program (line 1d)
- Type of action (line 2a)
- Effective date of action (line 2b)
- HOH Last Name (line 3b)
- HOH First Name (line 3c)
- HOH SSN (line 3n)
- Date unit last passed inspection (line 5g)
- Date unit last inspected (line 5h)
- Total annual income (line 7m)
- Tenant rent (lines 10e, 10s, 11s, 11ak, 12x, 12ai)
- Income quantity by source (summary field)
- Unit address (line 5a)

6.2 PHA Uses for Report

- **Monitor MTCS reporting rates**

PHAs can use the '**standard download**' option to generate a list of families in MTCS that the PHA can compare to their records. PHAs can use this report to identify families that require resubmission to MTCS (i.e., families that require an annual reexamination, or families that require the PHA to submit an end of participation record to MTCS.

For example, the PHA may find that a family it transmitted to MTCS was not stored in the database or that MTCS does not have the latest action for a family. In either instance, the report identifies for the PHA which families require transmission to MTCS.

If a PHA does not want to use the 'standard download' option, but would prefer to view the information on screen in MTCS, the PHA should select:

- Program (line 1d)
- Type of action (line 2a)
- Effective date of action (line 2b)
- HOH Last Name (line 3b)
- HOH First Name (line 3c)
- HOH SSN (line 3n)

- **Plan and administer programs**

MTCS allows users to create customized reports through the use of Ad Hoc selection. There are a variety of different ways to use Ad Hoc data:

Monitor Housing Quality Standard Inspections

PHAs can select the **date unit last passed inspected** and **date unit last inspected** to plan for PHA inspection schedules.

The PHA can select the fields in Ad Hoc to identify which families may require an inspection:

- Program (line 1d)
- HOH last name (line 3b)
- HOH first name (line 3c)
- HOH SSN (line 3n)
- Date unit last passed inspection (line 5g)
- Date unit last inspected (line 5h)

Income Targeting

Does the PHA have a high percent of "income limit unavailable" in the summary reports? If so, PHAs can check what addresses MTCS has for each family and determine if the PHA incorrectly entered any addresses into their software. Unless the PHA only requires the family's zip code, PHAs must use the '**next day download**' function for any Ad Hoc reports that contain unit address fields.

The PHA can select the fields in Ad Hoc to review family addresses:

- Program (line 1d)
- HOH last name (line 3b)
- HOH first name (line 3c)
- HOH SSN (line 3n)
- Current zip code (line 5a)
- Unit address (line 5a)

- Unit apartment number (line 5a)
- Unit city (line 5a)

Ensure families pay less than 40 percent of annual income for rent

The Public Housing Reform Law requires that PHAs do not charge Section 8 families more than 40 percent of their annual income for rent. You can use Ad Hoc to check the rent burden of existing families in MTCS. This can help prepare for future reexaminations and help monitor compliance. The PHA should choose the **'next day download'** option so that the PHA can import the data into a spreadsheet program to perform calculations.

The PHA can select fields in Ad Hoc to calculate a family's rent burden:

- Program (line 1d)
- HOH last name (line 3b)
- HOH first name (line 3c)
- HOH SSN (line 3n)
- Total annual income (line 7m)
- Tenant rent (lines 10e, 10s, 11s, 11ak, 12x, 12ai)

Conduct research

PHAs can now use MTCS to generate a **'random sample'**. PHAs can use this feature to spot check performance of staff and to conduct analysis. For example, if the PHA manages their Public Housing activities by project, the PHA can perform a random sample to identify families for which the PHA should review files.

6.3 HUD Uses for Report

Answer PHA questions about MTCS Discrepancy reports

Has a PHA called you to question families listed on the Discrepancy reports? If so, you can generate an Ad Hoc Report to determine what MTCS has stored for these families. Ad Hoc can help identify actions that the PHA must take to remove these families from the Discrepancy reports.

For example, if a PHA is concerned about families that appear on the Late Reexamination Report, the Field Office or TARC can run an Ad Hoc Report. The Field Office or TARC should select these fields:

- Program (line 1d)
- Type of action (line 2a)
- Effective date of action (line 2b)
- HOH Last Name (line 3b)
- HOH First Name (line 3c)
- HOH SSN (line 3n)

Monitor PHA performance

Does your Field Office or TARC need to audit family files when you perform a site visit. If so, use the '**random sample**' feature to select the families for which you need to review the files. This feature ensures that HUD staff selects the families randomly and the data is not skewed by personal preferences.

Verify PHA compliance with regulation

The Public Housing Reform Law requires that PHAs do not charge Section 8 families more than 40 percent of their annual income for rent. Field Offices and TARC can use Ad Hoc to check the rent burden of families in MTCS. This can help the Field Office or TARC monitor PHA compliance. The Field Office or TARC should choose the '**next day download**' option so that it can import the data into a spreadsheet program that can perform calculations.

The PHA can select fields in Ad Hoc to calculate a family's rent burden:

- Program (line 1d)
- HOH last name (line 3b)
- HOH first name (line 3c)
- HOH SSN (line 3n)
- Total annual income (line 7m)
- Tenant rent (lines 10e, 10s, 11s, 11ak, 12x, 12ai)